



**TOWN OF ANDOVER FISCAL YEAR 2021 APPLICATION  
ANDOVER MEANS TESTED SENIOR TAX EXEMPTION**

This Form Approved by the Andover Board of Assessors

In order to be eligible for this exemption:

- You, or at least one joint applicant, must have owned and occupied a home in Andover as your principal residence for the past 10 consecutive years.
- You must have filed a 2019 MA state income tax form Schedule CB.
- Applicant must be 65 by December 31, 2019 (joint applicant is at least 60).

**THIS APPLICATION MUST BE RECEIVED BY THE ASSESSOR'S OFFICE BY OCTOBER 2, 2020.**

Incomplete applications will not be processed. Please complete all of the requested information.

- Name of Applicant(s): \_\_\_\_\_  
Address: \_\_\_\_\_  
City / Town: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Home Phone: \_\_\_\_\_ Cell / Work: \_\_\_\_\_
- Applicant's date of birth: \_\_\_\_\_. Joint applicant's date of birth: \_\_\_\_\_
  - Provide a copy of either a Valid Massachusetts ID or Birth Certificate if not previously submitted.
- Assessed Valuation (prior fiscal year): \$ \_\_\_\_\_. No. of units: \_\_\_\_\_
- How long have you owned this property? \_\_\_\_\_
  - If less than 10 years, prior property location: \_\_\_\_\_
- Is the property subject to a trust as of January 1, 2019? \_\_\_\_\_. *If yes, please attach trust instrument including all schedules if not previously submitted or has changed.*
- Do you own any other real estate? YES / NO If yes, where? \_\_\_\_\_
- For FY2021, have you been granted any exemption in any other municipality? \_\_\_\_\_. Where? \_\_\_\_\_
- Circuit Breaker Income Tax Credit Amount for 2019 MA State Income Filing: \$ \_\_\_\_\_

**Please attach a copy of your MA Income Tax Filing and MA CB Schedule.**

Subscribed this \_\_\_\_\_ day of \_\_\_\_\_ 2020 under the pains and penalties of perjury.

Signature of Applicant: \_\_\_\_\_

*The filing of this exemption does not stay the collection of your real estate tax obligation. If the exemption is approved, a credit will be applied to the actual tax bill issued in December 2020 due February 1, 2021.*

**BOARD OF ASSESSORS ACTION**

APPROVE: \_\_\_\_\_ EXEMPTION AMOUNT: \$ \_\_\_\_\_

DENY: \_\_\_\_\_ Signatures: \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_

**APPLICATIONS FOR FY2021**  
**ANDOVER MEANS TESTED SENIOR CITIZENS**  
**PROPERTY TAX EXEMPTION**

**NOW AVAILABLE**

As a result of the efforts of the Elder Services Task Force, a warrant article was passed at the 2018 Annual Town Meeting. This warrant article provides for a local exemption of property taxes for taxpayers who receive the circuit breaker income tax credit when filing the Massachusetts Income Tax. On October 5, 2018, this home rule petition was signed into law. This article will explain the implementation of the Andover Means Tested Senior Citizens Property Tax Exemption.

**WHEN:**

This exemption has been implemented as of FY2020. FY2021 will be the second year this exemption is available. Amounts exempted will be credited on the February 1, 2021 tax bills. The actual tax bills for FY2021 are mailed at the end of **December 2020**.

**WHEN TO APPLY:**

Applications are now available in the Assessors' Office and online at the bottom of the page of <https://andoverma.gov/193/Assessor> . Completed applications are due to the Assessors' office no later than October 2, 2020. This exemption DOES NOT AFFECT TAX BILLS ISSUED PRIOR TO DECEMBER 2020.

**TO BE ELIGIBLE:**

To qualify for this exemption, you must have owned and occupied an Andover property as your domicile for the last 10 years, be 65 years of age as of December 2019 and receive the circuit breaker Income Tax Credit when you file your 2019 Massachusetts Income Tax Return. The application to the Assessors' Office will ask you to attach your Massachusetts Income Tax Return along with circuit breaker tax schedule Form CB to verify eligibility.

**EXEMPTION AMOUNT:**

The Andover Means Tested Senior Citizen Property Tax Exemption amount is determined annually by the Board of Selectmen. "The board of selectmen shall annually set the exemption amount provided for in this act, provided however, that the amount of the exemption shall be up to a 100 per cent match and not less than a 50 per cent match of the amount of the circuit breaker income tax credit...for which the applicant received in the previous year." The Selectmen will hold a meeting in late 2020 to determine the percentage of the circuit breaker amount that will be exempted on the FY2021 real estate tax.

**QUESTIONS:**

If you have any questions relative to this exemption, please call the Andover Assessors' Office at 978-623-8930 M-F 8:30 AM to 4:30 PM or email [assessor@andoverma.gov](mailto:assessor@andoverma.gov) .